C3975-1

FOREST INDUSTRIES

DECEMBER 1990

1991 Equipment Catalog AND BUYERS' GUIDE

**********ALL FOR STATE
0800091758 090191 12
SERVICE INC/STATIS REF INDEX
CONGRESSIONAL INFORMATION
4520 EAST-WEST HWY STE 800
BETHESDA MD 20814

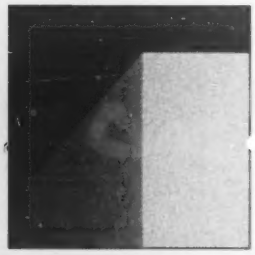
DEC 1990

FOREST INDUSTRIES

NEWS

5 Largest sawmillers dominate the industry Despite a very small dip in North America's lumber production in 1989, the largest companies maintained their dominance of the softwood industry

FEATURES



15 'Show and tell' is not just for kids anymore Loggers also have a responsibility to show off their work and tell people good forestry is environmentally sound

19 Special feature: Equipment Catalog This annual section gives prominence to new mill and logging machinery. Products range from new models introduced by heavy equipment manufacturers to small electronic components. All are designed to increase efficiency and productivity

28 FOREST INDUSTRIES Suppliers' Showcase This special advertising section puts products and literature in a whole new light, with a colorful presentation and short descriptions of products and services. Information described is available free from industry suppliers through a reader service card

31 Buyers' Guide, Part 1: Directory of Categories This is your road map to the 1991 Buyers' Guide, showing where to find products and service groups and individual categories in the classified pages of the Guide which follow

33 Buyers' Guide, Part 2: Classified Directory Names of suppliers to the forest products industry are arranged by the type of product or service provided

55 Buyers' Guide, Part 3: Alphabetical Directory The same supplier names listed in the classified section are arranged alphabetically in this section of the Guide, along with mailing addresses, telephone and fax numbers

1991 Equipment Catalog AND BUYERS' GUIDE

DEPARTMENTS

5 News **12 Letters** **77 News**
87 Suppliers **92 Conversation**

VOLUME 117 NUMBER 10

PUBLISHER/EDITORIAL DIRECTOR David A. Pease EDITOR Mary Lou Corlett SENIOR EDITOR Ted Blackman MANAGING EDITOR Jennifer A. Sowle REGIONAL EDITOR John D. Bland ASSISTANT EDITOR Lisa A. Monson ADMINISTRATIVE ASSISTANT Emily N. Freeman PUBLICATION DESIGNER Jill Dupont

VICE PRESIDENT/GROUP PUBLISHER Leonard E. Haas PUBLISHING DIRECTOR Leigh M. Freeman

PUBLISHING OFFICE 500 Howard Street, San Francisco, Calif. 94105. Telephone: (415) 397-1881. Telex: 278273. Fax: (415) 995-2484
REGIONAL EDITORIAL OFFICE Suite 450, 2000 Powers Ferry Center, Marietta, Ga. 30067. Telephone: (404) 952-1303. Fax: (404) 933-0666

SUBSCRIPTIONS: Available without charge to individuals in the logging, lumber and plywood and board manufacturing industry in the U.S. and Canada. To all others there is a subscription charge of US$35 a year in the U.S./Canada. All subscriptions in other countries: US$85 a year, except Europe and the Mediterranean, US$75 (air service included). Single copy US$8.00. 16-mm microfilm, 35-mm microfilm, 105-mm microfiche and article and issue photocopies are available from University Microfilms International, 300 N. Zeeb Rd., Ann Arbor, Mich. 48106. (313) 761-4700.
Requests, subscription orders and address changes must show name, job or position of individual, name and location of mill, plant or office where employed, and exact business conducted at this location. Send subscription correspondence to Circulation Department, FOREST INDUSTRIES, 500 Howard Street, San Francisco, CA 94105. For address change, include label from recent issue.
FOREST INDUSTRIES (ISSN 0015-7430) is published monthly except combined issues in Jan./Feb. and July/August by Miller Freeman Publications, 500 Howard Street, San Francisco, CA 94105. Second class postage paid at San Francisco, Calif., and at additional mailing office. POSTMASTER: Please send address changes to FOREST INDUSTRIES, 500 Howard Street, San Francisco, CA 94105.

Largest sawmillers dominate the industry

Despite a very small dip in North America's lumber production in 1989, the largest companies maintained their dominance of the softwood industry. This group of 20 companies, equally divided between Americans and Canadians, cut nearly one-third of the lumber produced last year in North America.

This is one result of an analysis of production figures from individual companies across the continent, gathered by FOREST INDUSTRIES editors and compiled into the 1990-91 edition of the *North American Factbook*.

The book includes production data from as many companies as possible that saw at least 1 million bd ft a year. This year, we found 811 of them; they operate almost 1500 sawmills. Undoubtedly, there are more—especially hardwood sawmills. The hardwood lumber industry is far more fragmented than the softwood side, with many hundreds of small mills whose aggregate output came close to 11 billion bd ft in 1989.

Of those 800-plus producers, a relative few accounted for the great majority of the lumber cut in North America. The 100 largest lumber producers—12% of the total companies who responded to our survey—operate 40% of the sawmills included. These 594 sawmills cut 44.14 billion bd ft of lumber (hardwood and softwood), or 60% of the lumber produced last year in North America.

The smallest of the "top 100" companies turned out 116 million bd ft; three companies tied at this level. The largest, Weyerhaeuser Co., produced 2.97 billion bd ft—more than 25 times as much as the 100th. Nine companies produced more than 1 billion bd ft, five in the U.S. and four in Canada. *(For information about ordering the book, see below.)*

During the past decade, the share of total production accounted for by the top 100 sawmillers has grown, from nearly 52% in 1980 to 57% in 1985 and 60% in 1989. There were small ups and downs in the "top 100's" share over the years, but the trend continues (see Table 2, next page).

Table 1 lists the top 20 lumber producers in the U.S. and Canada. Canada's largest producer in 1989, Canfor Corp., was only fourth on the list. That is the same spot occupied by Canada's largest lumber producer in 1988, only then the leader was Fletcher Challenge Canada. Canfor jumped ahead of Fletcher Challenge by acquiring Balfour Forest Products in mid-1989.

Louisiana-Pacific Corp. and Georgia-Pacific Corp. followed Weyerhaeuser on the list in 1989, just as they did in 1988. G-P may edge out L-P for second place when 1990 numbers are compiled, since its purchase of Great Northern Neekoosa Corp. this year added more than 200 million bd ft to its lumber capacity.

Noranda Forest Inc. appears on our list of the 20 largest lumber producers for the first time, in fifth place. In past years, we have listed Noranda's wholly owned subsidiaries under their own names; this year, we combined their totals.

However, companies not wholly owned by Noranda continue to have

TABLE 1—Top 20 producers, U.S. and Canada

Company name & headquarters	# of mills	1989 production (million bd ft)	Rank in 1988
1. Weyerhaeuser Co. Tacoma, Wash.	36	2,971	1
2. Louisiana-Pacific Corp. Portland, Ore.	57	2,441	2
3. Georgia-Pacific Corp. Atlanta, Ga.	46	2,426	3
4. Canfor Corp. Vancouver, B.C.	13	1,592	7
5. Noranda Forest Inc. Toronto, Ont.	10	1,463	N.A.
6. Fletcher Challenge Canada Vancouver, B.C.	11	1,296	4
7. WTD Industries Portland, Ore.	25	1,242	8
8. West Fraser Timber Co. Vancouver, B.C.	6	1,170	6
9. Weldwood of Canada Vancouver, B.C.	8	1,153	5
10. Sierra Pacific Industries Redding, Calif.	9	950	9
11. Boise Cascade Corp. Boise, Idaho	14	803	12
12. International Paper Co. Dallas, Texas	10	800	11
13. MacMillan Bloedel Vancouver, B.C.	8	792	10
14. RSG Forest Products Kalama, Wash.	6	786	13
15. Slocan Forest Products Richmond, B.C.	7	740	17
16. Champion International Corp. Stamford, Conn.	10	671	16
17. Donohue Inc. Montreal, Que.	8	620	33
18. Simpson Timber Co. Seattle, Wash.	9	615	22
19. International Forest Products Vancouver, B.C.	6	601	18
20. Westar Timber Ltd. Vancouver, B.C.	5	600	19

NOTE: Companies are ranked according to data gathered by FOREST INDUSTRIES.

TABLE 2—Comparative data, top 100 companies, 1980-1989 (million bd ft, hardwood and softwood; includes U.S. and Canada)

Year	Total volume reported by top 100 co.'s	Number mills in top 100	Total volume by year's top producer	Cutoff volume of year's 100th producer	Co.'s producing more than 1 billion bd ft
1980	28,037	641	2,889	80.000	4
1981	26,956	657	2,744	74.580	3
1982	26,043	603	2,147	71.000	4
1983	34,305	610	3,123	98.058	5
1984	35,870	585	2,989	100.708	5
1985	35,625	572	2,609	104.187	7
1986	38,238	554	2,553	119.832	6
1987	43,475	589	3,139	128.181	8
1988	43,786	601	2,942	128.765	8
1989	44,146	594	2,971	116.000	9

SOURCE: Data compiled by FOREST INDUSTRIES.

separate listings. WTD Industries of Portland, Ore., the continent's fastest-growing lumber producer, moved up another notch in 1989 to seventh. WTD, which didn't even exist 10 years ago, grew by rapid acquisitions of sawmills, most of which were shut down when the company bought them.

These 20 lumber producers manufactured more than 24 billion bd ft in 1989. This is nearly one-third of North America's total output. But these firms are dominant in softwoods: while they account for 38% of the softwood lumber cut in Canada and the U.S., these companies produced only 4% of the hardwood.

The top 10 American sawmillers cut 13.66 billion bd ft, or 28% of the nation's total. In Canada, the 10 leaders were even more dominant: their 10 billion bd ft accounted for 40% of the national total.

To order your copy of the latest issue of the *North American Factbook*, see p. 86. ■

G-P rejects employees' stock-buyout scheme

Georgia-Pacific Corp. officials may have had a good time taking over Great Northern Nekoosa Corp., but they're not interested in having the same thing happen to them.

G-P "refuses to take seriously" a proposal that its 60,000 employees take over the company by buying its stock. The biggest employee stock ownership program ever proposed in the U.S. could cost $10 billion.

International Business Consultants of Dallas, Texas, representing a small group of people from Texas and Arkansas, is leading the proposal to get G-P employees to buy the Atlanta-based company. With its acquisition of Great Northern this year, Georgia-Pacific became North America's largest forest products company.

G-P chairman and chief executive officer T. Marshall Hahn Jr. called IBC's scheme "misleading or manipulative." G-P "does not take seriously the possibility that . . .IBC could effect the buyout using an employee stock ownership plan."

Hahn also warned employees that they are taking a risk by investing in the buyout plan. In a prepared statement, he said two Arkansas real estate brokers and a former GNN employee are behind the bid.

Other news of mergers in the forest products industry:

- Bohemia Inc. of Eugene, Ore., wants to sell its California operations, and is considering offering some or all of its Oregon mills for sale. Bohemia owns 35,000 acres of timberland in California, a medium-density fiberboard plant at Rocklin and sawmills at Lincoln and Grass Valley.
- Northwood Pulp and Timber Ltd. will buy Rustad Bros. & Co. of Prince George, B.C. Rustad runs two sawmills and a wood preserving plant in Prince George. Northwood is jointly owned by Mead Corp. and Noranda Forest Inc.
- Hanson Industries of New York City has completed its purchase of an 85% share of Cavenham Forest Industries. The purchase price was $1.11 billion; Hanson will acquire the remaining 15% in August 1991 for $189 million. Cavenham is the sixth-largest private owner of timberland, with 1.7 million acres in Oregon, Washington, Mississippi and Louisiana. Cavenham's three sawmills cut 390 million bd ft in 1989; it leases the two Joe N. Miles & Sons sawmills, which produced 150 million bd ft. ■

Scott starts 2nd mill to make chips for export

Scott Paper Co. has started up a second chip mill which will supply pulp chips to Japan. The new mill is at Alliance, Ala., 16 miles north of Birmingham. The $4.3-million mill was designed and is being manufactured and installed by Progress Industries.

Cooper Chip Mill (Alabama) will produce about 300,000 tons of chips a year on a one-shift basis. It is one of two mills that will supply Scott Paper's $10-million chip export facility in Mobile, Ala. Barges will move chips from Alliance to Mobile.

A similar mill started up Oct. 1 on the Tenn-Tom Waterway in Tishomingo County, Miss. Operated by Shuqulak Lumber Co., it will also ship chips by water to Mobile. Price Industries built the Shuqulak mill.

Scott's port in Mobile opened last April with a capacity to handle 1.7 million tons of chips a year. ■

ADVERTISING INDEX

To obtain more information on advertised products in this issue, circle the corresponding number on the Reader Service Card facing page 84 in this issue.

	Page No.	Reader Service No.
Acora AB	16	208
Amigos Empleo Legal Inc.	89	
Balloff	82	234
Barbee Technology	88	
Bejma AB	85	236
Bonded Machine Co.	75	226
Bonney, Turner & Harris, Inc.	90	
C. Itoh Industrial Machinery/TCM	79	231
Caterpillar	COV2	200
Chiparvestors Inc.	18	218
Clarke's Sheet Metal	81	233
Corley Manufacturing	36	219
Deere & Co.	COV4	238
Desco Industrial	90	
J. Dieffenbacher Maschinenfabrik GmbH	14	207
Digitron Electron	90	
Directory of the Forest Products Industry, 1990	58	222
The Douglas Reiter Co.	90	
Dresser Marketing Division	10-11	206
Dubal, Beck & Associates	90	
Dupont Corp.	2	202
Durand-Raute	30	217
Forest Industries	88	
Forest Industries 1991 Clinic & Show	66-67	225
Forest Industries Bookshelf	78	
Freeman Staffing	88	
Fulghum Industries Inc.	23	213
HCMA Consulting Group Inc.	90	
Hahn Machinery Inc.	62	223
Halico Manufacturing Co.	17	209
Harris Group	90	
Hendrickson Suspension	COV3	237
High Temperature Drying	76	239
Hitachi Construction Machinery (America) Corp.	4	203
Hydra-Power Systems Inc.	82	235
Irvington-Moore	63	224
IMAL	49-50	—
KH2A Engineering	90	
Komatsu	7	204
Leo Systems Inc.	90	
Louisiana-Pacific Corp.	89	
Lumberline Laser Repair	88	
Management Recruiters Of Monroe	88	
Manitowoc Engineering Co.	8	210
Markets 1991 Report	26	216
Mater Engineering Ltd.	90	
McCarthy Products	89	
Mid-South Engineering	90	
Nabors Trailers Inc.	47	220
Nelson Paint Company	79	230
Pace Products Inc.	73	227
Pacific/Hoe Saw & Knife Co.	1	201
Pease & Beadling Engineers	90	
Peerless	40	220
Peterson Pacific Corp.	27	205
Precision Husky	21,54	211,221
Progress Industries Inc.	71	229
Protovale (Oxford) Ltd.	89	
R.J. Hill Engineering	90	
R.K. Haskew & Co., Inc.	89	
Ruckle Veneer Systems Inc.	23	212
Schaefer Enterprises	88	
Search North America	90	
Sern Controls	90	
Simons-Eastern Consulting	90	
Sobopla S.P.R.L.	89	
Stihl Inc.	25	215
Van Gulik/Oliver Inc.	90	
Ward Equipment Sales Co.	90	
Westcoast Cylinders	80	232
Western Roller Corp.	24	214
Weyerhaeuser Co.	88	

SUPPLIERS' SHOWCASE

Applied Theory	28	27
CAE Machinery Ltd.	28	28
Forest Industries 1990-91 North American Factbook	28	30
Irvington-Moore	28	25
Lucidyne Technologies Inc.	28	29
Mack Manufacturing	29	35
Markets '91	29	31
Moisture Register Products	29	34
B.H. Payne	28	26
Rens Manufacturing Co.	29	33
Schurman Machine	29	32
Silvatech Corp.	29	36

FOREST INDUSTRIES

Combining *The Timberman* and *The Lumberman*

PUBLISHING / SALES HEADQUARTERS

SAN FRANCISCO, CALIFORNIA 94105
500 Howard St., (415) 397-1881
Telex: 278273 Cable: Millfreepub
Leigh M. Freeman, Publishing Director
Leonard E. Haas, Group Publisher
Jerry Okabe, Director of Circulation
Andrew A. Mickus, Director of Production
Jean A. James, Ad Production Coordinator

REGIONAL SALES OFFICES

SAN FRANCISCO, CALIFORNIA 94105
500 Howard St.
(415) 995-2411
Telex: 278273 Fax: (415) 995-2484
Jan Curcio, Western Sales Manager
Susie J. Chapman, Sales Assistant
Emily N. Freeman, Administrative Assistant

MARIETTA, GEORGIA 30067
2000 Powers Ferry Center, Suite 450
(404) 952-1303 Fax: (404) 933-0686
Jay E. Schlosser, Southern Sales Manager
Cyndi Ratcliff, Midwest/Eastern Sales Manager
Mary Anne Cauthen, Sales Assistant
Cheryl Rainey, Sales Assistant

LONDON, ENGLAND
Lansdowne Media Services Ltd.
2 Claridge Court, Lower Kings Road
Berkhamsted, Hertfordshire, UK, HP4 2AF
Telephone: +44 442-87 77 77
Telex: 826235 LMSLTD G Fax: +44 442 87 06 17
David M. Lansdowne
Melissa Thomas, Sales Assistant

B-1180 BRUSSELS, BELGIUM
BWB Media Services
198 Avenue Winston Churchill, Boîte 4
Telephone: (02) 347-31-35
Telex: 63546 BWB B Fax: (02) 347-32-06
Brian W. Bussey
Wanda E. Schaar

D-4630 BOCHUM 6, FED. REP. GERMANY
Postfach 600 264
Telephone: 2327-88609 Telex: 820468 EDH
Fax: 2327-89257
Ernst Dieter Hartmann

TOKYO, JAPAN
Orient Echo Inc.
1101 Grand Maison Shimomiyabi-cho 8
Shinjuku-ku, Tokyo 162, Japan
Telephone/Fax: (03) 235-5961 Telex: J33376
Masahiko Yoshikawa

ADVERTISING: Complete offset negatives and inserts should be sent to FOREST INDUSTRIES, c/o CCS Mendota, 1501 Washington St., Mendota, IL 61342. Copy and art for publication-set ads, all insertion orders and special instructions should be sent to the publishing office: 500 Howard Street, San Francisco, Calif. 94105.

VBPA ABP

©COPYRIGHT 1990 by Miller Freeman Publications Inc. All rights reserved. Contents may not be reproduced without permission. *Forest Industries*, *The Timberman*, *The Lumberman*, *National Timber Industry*, *Western Timber Industry* and *Industrial Wood Energy* are trademarks of Miller Freeman Publications Inc.

MILLER FREEMAN publications
A MEMBER OF THE UNITED NEWSPAPERS GROUP

Chairman of the Board: Clifford D. Jakes; President: Marshall W. Freeman; Senior Vice Presidents: Charles C. Beake, Leonard E. Haas, Thomas L. Kemp, Wini D. Ragus; Vice Presidents: Charles H. Benz, Leigh M. Freeman, Andrew A. Mickus, Donald A. Pazour; Chief Financial Officer: Stephen A. Daniels; Treasurer: Miller Freeman III; Assistant Treasurer: Douglas M. Denny.